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US-Iran Talks at a Crossroads

Tehran's Red Lines, Trumpian Maximum Pressure, and Regime Survival

Ali Fathollah-Nejad

Synopsis

More than a month into negotiations between the United States and Iran, the talks have reached a critical stage. This new phase is characterised by a clearer picture of both sides' goals and red lines. As the fifth round of talks on 23 May at the Omani Embassy in Rome has shown, the Trump administration's latest demand for "zero enrichment" collides with the Islamic Republic's proclaimed "red line" to keep its domestic nuclear infrastructure intact. Moreover, it is not clear to what extent a new agreement would affect Iran's ballistic missile programme and its regional policy.

Furthermore, a potential deal between the US and Iran that falls short of Israeli interests – especially in view of Tehran's missile and nuclear threats – is no guarantee for a sustainable security arrangement and stabilisation in the region. Meanwhile, the stakes for the Iranian regime could not be greater, as it faces not only grave economic and military pressures from the outside, but also an unprecedented domestic economic crisis that could trigger another wave of popular uprisings, as indicated by the current, nationwide lorry-driver strike. In other words, the Islamic Republic has to contend with a perfect storm darkening on the horizon, especially if a deal with Washington fails to materialise.

The Islamic Republic's Red Lines

For the Islamic Republic, there are several red lines in these – and even prior – negotiations with the United States. These red lines underpin the regime's sources of power (and power projection) – and should therefore not be confused with red lines regarding the national interests and sovereignty of the Iranian people. As such, the regime in Iran has little flexibility to concede any of these red lines, except in the form of cosmetic or temporary concessions (which are detailed later on):

Keeping the nuclear programme and its infrastructure in place, including domestic enrichment of uranium

In regime jargon, the continuation of the nuclear programme is often referred to as Iran's "inalienable right" to a peaceful nuclear programme as stipulated by the Treaty on the Non-Proliferation of Nuclear Weapons (NPT). This rhetoric provides Tehran the permission structure to reactivate its nuclear escalation strategy at any time, and with it, to use an expanded nuclear programme and the concomitant threat of a nuclear-armed Iran as key leverage to deal with and extract concessions from the West – whether economic or geopolitical. Over the past two decades, the Islamic Republic has successfully pursued a strategy of nuclear escalation, repeatedly securing concessions from the Western side of the negotiating table, be they in terms of sanctions relief or the abandonment of a robust Iran policy in the West.[1]

Against this backdrop, as an official recently, and even openly, admitted, Tehran wants to assure its ability to re-engage in nuclear escalation, particularly in case Washington (under the present or next administration) reneges on its deal obligations again. Also, this time as opposed to past instances, Tehran has dramatically expanded its nuclear programme, attaining in case of further nuclear enrichment enough fissile material for multiple nuclear warheads while significantly reducing the International Atomic Energy Agency (IAEA)'s ability to inspect the regime's nuclear facilities.[2] This has led IAEA Secretary-General Rafael Grossi to note that his Agency can no longer guarantee the peaceful nature of Iran's nuclear programme. Furthermore, given Tehran's increased military vulnerabilities and its weakened position in the regional power balance since 2024, turning the Islamic Republic into a nuclear-armed state has become the last remaining option to safeguard regime survival for some parts of the Iranian establishment (although such hopes may be misplaced).[3] However, Iran does not possess the option to further pursue nuclear escalation anymore, as it would thereby risk to provoke Israeli and perhaps also US military action against its nuclear infrastructure. Given these external pressures, Tehran openly declares its offer to renounce nuclear weapons today as the basis for a nuclear deal. Bizarrely, this claim is put forward by the same state that has consistently insisted that it is only pursuing a civilian nuclear programme and has stated that nuclear weapons are forbidden according to its Islamic beliefs.

Keeping the missile programme and its infrastructure intact

Since 2015, when the last nuclear deal was reached (the so-called Joint Comprehensive of Action, or JCPOA), Iran has considerably expanded its missile and drone programmes. In 2024, it demonstrated its willingness to use these capabilities, launching 500 missiles in its two unprecedented direct assaults against Israel. While the missiles were overwhelmingly intercepted by Israel, the US, and some of the regional Arab partners of the latter, Israel fears that a next wave of Iranian missiles could turn out to be more devastating, as a large number could overwhelm its air-defence systems.

More recently, on the day of US President Donald Trump's 13-May visit to Riyadh, the commander-in-chief of the Islamic Revolutionary Guards Corps (IRGC), Hossein Salami, threatened Israel with the launch of 600 missiles, the bulk of which, in his view, could not be intercepted.[4] Israeli experts assess that Iran has several hundred missiles left. Iran's missile arsenal includes cruise missiles as well as ballistic missiles. The latter could reach Israel within minutes and constitute the preferred delivery system for nuclear weapons. Moreover, the radius of Iranian missiles even extends to parts of the European continent. Against this backdrop, the Islamic Republic views its expanding missile programme not only as a significant prestige project (potentially now even replacing the stature attributed to the nuclear programme) but as a key factor in deterring, intimidating, or attacking external foes. As such, it constitutes one of the key guarantees for its survival.

No limitations on Iranian support for the 'Axis of Resistance' throughout the Middle East

Since the Iran-led 'Axis' witnessed a historic defeat last year – given the decimation of Hezbollah and Hamas and the collapse of the Assad regime in Syria (which served as a land bridge for Iranian weapons to the Levant) – Tehran hopes to revitalise this network.[5] At the present stage, the only remnants of that 'Axis' are pro-Iranian Shia militias in Iraq (the Popular Mobilization Forces, or PMF) and the Houthis in Yemen. As Iran tries to re-establish the strength of its regional power network (as it currently tries to do in post-Assad Syria),[6] it will not accept US constraints and threats of military action toward this end. After all, for decades, the so-called 'Axis of Resistance' served as a primary means of power projection and leverage for Tehran vis-à-vis the West.

Now, as Iran's regional power has become a shadow of its former self, Tehran views its missile programme as its single most important remaining piece of leverage in negotiations with the West. This logic was summarised by Foreign Minister Abbas Araghchi on 15 May in front of reporters in Tehran: "In fact, it is our defensive capabilities – the missiles of the Islamic Republic – that give strength and power to the negotiator to sit at the table, and it is these that cause the other side to give up and lose hope in a military attack."[7]

US Position Hardening: Toward "zero enrichment"

The US position under Trump 2.0 has been subject to constant inconsistencies and contradictions as to the goals of its Iran diplomacy as well as its general policy vis-à-vis the Islamic Republic. This has long been reflected within the administration, with one camp (including Special Envoy for the Middle East Steve Witkoff and Vice President J. D. Vance) favouring a nuclear deal only and another (including former National Security Advisory Mike Waltz and his successor and Secretary of State, Marco Rubio) preferring a more comprehensive arrangement that also addresses Iran's ballistic-missile programme and potentially its support for the 'Axis.' In fact, the latter position is not only favoured by so-called Iran hawks from the Republican Party but also – quite notably – by former Obama-administration Secretary of State and JCPOA negotiator John Kerry.[8] Both camps seem to gather behind the Trump II administration's foreign-policy motto of 'peace through strength,' a credo consistently stressed by Witkoff.

Trump himself has made clear during his campaign for re-election and since his return to the White House that his single most important policy goal toward Tehran is to avoid a nuclear-armed Iran. This narrow focus on the nuclear issue has been particularly on display during the first two rounds of Iran–US talks (mediated by Oman and taking place in Muscat on 12 April and at the Omani Embassy in Rome on

19 April), thereby echoing Tehran's preference. In fact, for the Islamic Republic, the primary aim in diplomacy with the US is to keep the focus on the nuclear issue so as to avoid discussing its missile programme and regional policies. In that light, those two initial rounds of talks had gone according to plan from the Iranian perspective.[9]

However, moving into the third round of talks in Muscat on 26 April, the gap between the two parties appeared in a clearer light. According to an Iranian official familiar with the talks, Tehran started viewing its missile programme as a major sticking point in the negotiations. But even on the nuclear front, major sticking points were reported then, yet without many details provided.

A major turn in the US public position toward demanding "zero enrichment" occurred between the fourth (on 11 May in Muscat) and fifth rounds (23 May in Rome) – much to the consternation of Tehran. In a May 18 interview, U.S. negotiator Witkoff insisted that Iran could not be allowed "even one percent of an enrichment capability," as maintaining a domestic enrichment capability would allow for weaponisation.[10] The same argument was laid down two days later by Rubio before the Senate Foreign Relations Committee, who added that like other states, Iran could import enriched uranium for civilian use.[11] In other words, the US position has seemingly overcome the above-sketched, long-assumed intra-administration factionalism on Iran, converging on the central demand of "zero enrichment" with no domestic enrichment capabilities left for Tehran.

Israel's position: From the 'Libyan model' to "zero enrichment"

Beyond the figure of Prime Minister Benjamin Netanyahu, Israel has long made clear that it demanded the 'Libyan model' be applied to the Islamic Republic, i.e. the complete dismantlement of Iran's nuclear and missile programmes, with little to no domestic infrastructure left. This would, in fact, amount to nothing short of a wide-ranging military capitulation of the Iranian regime. If this was not reached via diplomacy, Israel reserved the right to act militarily against Iran's nuclear and missile infrastructures – with or without the US.

In fact, such Israeli goals are shared widely among the country's political and military establishment, especially given the country's experiences with Iran following 7 October 2023. Since then, the Islamic Republic – with its regional 'Axis' and missile programme – has evolved into a veritable, if not existential threat to Israel, given the small size of its territory.[12]

In fact, ahead of the fourth, postponed round of talks between the US and Iran on 11 May in Muscat, Israel's opposition leader Yair Lapid announced "five necessary basic conditions" for a nuclear deal: 1) "zero" uranium enrichment; 2) removal of all enriched material from Iranian territory; 3) demolition of centrifuges; 4) dismantling the ballistic-missile programme; and 5) close and unrestricted verification.[13]

For his part, Netanyahu over the past month has signalled Israel's minimum requirement for an Iran deal: namely, the total dismantlement of Tehran's nuclear enrichment programme. Following Washington's recent insistence on "zero enrichment", he has reiterated that Israeli position[14]. As such, the US and Israeli position regarding demands from Tehran seem to converge today[15].

The Main Points of Contention

The nuclear issue

In the initial phase of the talks, a simple nuclear deal had been widely regarded as a strong possibility, with Iran merely renouncing the militarisation of its nuclear programme in exchange for sanctions relief. Later, however, discord between the two sides over key details of a nuclear deal emerged. In Washington, there has been increasing talk of the necessity that Iran would need to widely dismantle its nuclear programme, including abandoning domestic enrichment and instead importing enriched uranium. These new US calls are now clearly colliding with the above-described Iranian red line, as Tehran insists to have a civilian nuclear infrastructure in place on its own soil. For Tehran, agreeing to these demands would deprive it of the last remaining leverage it believes it possesses: its ability to restart nuclear escalation whenever necessary.

The missile programme

Short of the Israeli demand of a total dismantlement of Iran's missile programme, other actors have also articulated various desires:

1. *Ballistic missiles and their range*: driving back the ballistic-missile programme, including missile range. In the past, the Islamic Republic has on various occasions suggested a willingness to limit the range to 1,000 km – which spare Europe but not necessarily Israel.
2. *Nuclear warheads*: At the time of the third round of talks, several European diplomats suggested that they advised US negotiators that any comprehensive agreement with Tehran should include restrictions to prevent Iran from developing or acquiring the capability to mount a nuclear warhead on a ballistic missile.[16] Meanwhile, Iran maintains that its missile programme is non-negotiable and insists it poses no threat to neighbours – a claim that collides with recent reality, not only regarding Israel but even Iran's immediate vicinity, as the Iranian missile strikes on Iraq and Syria in January 2024 demonstrated.

The 'Axis of Resistance'

Given the dramatic loss of power of the so-called 'Axis of Resistance' over the past year, this security challenge has been partly defused or is in the process of being addressed in the respective local contexts. As for Hezbollah and the PMF, both are embroiled in national processes that aim to either disarm them or bring them under the control of their respective states' armed forces – in other words, exiting them from the Iranian hard-power orbit. Hamas again finds itself under military pressure from Israel after the breakdown of the ceasefire on 18 March and Israel's widely criticised renewed assault on Gaza.

The only remaining disruptive force within the 'Axis' have been the Houthis in Yemen, who faced escalating weeks-long aerial attacks by the US that had cost the latter approximately 1 billion US Dollars.[17] To everyone's surprise, on 6 May, Trump announced a ceasefire deal with the Houthis that spares US ships from being targeted in the Red Sea, thereby following the Chinese and Russian model in this regard.[18] In fact, in March 2024, Beijing and Moscow had reportedly reached agreements with the Houthis according to which the two nations' ships would not be targeted. As a result, these narrow,

unilateral arrangements leave the Houthi threat for international shipping though the Bab Al Mandab Strait intact for others. In early May of this year, furthermore, the military confrontation between Israel and the Houthis escalated. On 5 May, the Israeli Air Force launched a series of strikes targeting the Houthis' main air- and seaport facilities in the Red Sea port city of Al Hudaydah, aiming to disrupt the group's logistics and supply lines.[19] In retaliation, on 8 May, the Houthis fired a long-range ballistic missile toward Israel, which struck near Ben Gurion Airport in Tel Aviv, temporarily disrupting international air traffic.[20]

It is not clear to what extent the Houthi issue will be part of a potential US-Iran deal, given the said Trump-Houthi arrangement and Iran's usual denial of its military support for the Houthis. However, through 12 May, Iran continued its efforts to ship weapons to the Houthis.[21]

Economic-*cum*-military pressure: How Trump forced Tehran to the negotiating table

The Islamic Republic is in a historic position of weakness and had initially opposed diplomacy with Trump, a position consistent with the Supreme Leader's doctrine of negotiating with the US only if it is possible to do so from a position of strength. After all, throughout 2024, Tehran had suffered major defeats: Israel had destroyed Iranian air defences, leaving key regime infrastructures extremely vulnerable in the event of another Israeli attack against Iran, while its 'Axis of Resistance' has lost core pillars (Hezbollah and Syria). As such, Tehran has lost much of the leverage that it had possessed over the last decades. Yet, given ever-mounting economic and military pressure from Trump, Supreme Leader Ali Khamenei did a U-turn, reversing his earlier categorical rejection of talks after he had empathically called these "not logical, nor wise, nor honourable" in February.

Economically, Trump has reimposed 'maximum pressure' sanctions with the aim of driving Iranian exports to zero – just as he had following his unilateral withdrawal from the JCPOA in May 2018. On 1 May 2025, amid ongoing US talks with Iran, he tightened the economic cord around the regime's neck, as he publicly declared that any importer of Iranian oil will lose access to the US market – a threat he had successfully directed against China in 2018 that forced the latter to completely halt oil imports from Iran in November of that year.[22] On the Iranian side, the IRGC and its foreign arm, the Quds Force (IRGC-QF), have emerged as the most important seller of oil, via various IRGC-linked networks and illicit sales through a shadow fleet.

Militarily, prior to the start of Iran talks, Washington began a military build-up in the region, namely in Diego Garcia, a joint US–UK base in the Indian Ocean. This is meant to underpin the military threat that Trump has consistently evoked in case of diplomacy failing, including US war planes that could hit Iran's underground nuclear facilities with bunker-buster bombs.[23] In other words, the military pressure Iran faces emanates from both Israel and the US, posing a grave threat to the Islamic Republic's key infrastructures – nuclear, missile, and energy. Such a scenario, as the regime is also aware of, could destabilise it and even endanger its survival.

In short, the combination of these economic and military pressures and threats have forced the hand of the Islamic Republic and its Supreme Leader Ali Khamenei with respect to sitting at the negotiating table with the Trump administration.

Consternation and Calculations in Tehran

It is against the earlier described evolution of negotiations with the US that voices of concern and warnings from within the Iranian establishment over the potential outcomes of diplomacy have increased from one round to the next. Now, in response to the US's "zero enrichment" demand, they have culminated in Khamenei's and the Foreign Ministry's defiance, warning that under such conditions, negotiations are doomed to fail.[24] In fact, the IRGC-affiliated daily *Javan* from 24 May – one day following the fifth round of talks – provided some insights into the establishment's understanding of the talks' trajectory and what it interprets to be at stake.[25] Its title story stated that given the "zero enrichment" demand, negotiations had expectedly become more complicated and slowed down, with a controversy now raging over enrichment – thereby touching upon Tehran's 'red line'.[26] For its part, the editorial entitled "Why is enrichment a red line?" laid out the different purposes of the levels of enrichment – from civilian to military. It then did not mince words when arguing that "there is no reason not to use nuclear technology as a deterrent and authority-building element", with "nuclear technology being a component of national power to confront enemies and political rivals from deploying sanctions and other measures against the Islamic Republic".[27] In other words, Iran's regime wants to retain domestic enrichment capacity not only to restart nuclear escalation when deemed necessary, but also as an option toward weaponisation. In reality, however, Tehran's nuclear programme has consumed a tremendous amount of the country's human, financial and political resources, with enrichment being neither economically sound nor an expression of 21st-century technological advancement, as former IAEA advisor and nuclear expert Behrooz Bayat has consistently laid out.[28]

Sources of regime concern over diplomatic failure: Risks of survival

Despite the steadfast tone of defiance, the Islamic Republic cannot afford a collapse of the talks. Walking away from the negotiation table risks inviting new economic and military pressure, which would threaten the regime's survival – the single most important objective of the Iranian leadership. Economically, US pressure on Iranian oil revenues could intensify and comprehensive UN sanctions could even be reimposed. In a significant detour from their previous quasi-appeasement toward Tehran,[29] the E3 (France, Germany, and the UK) has threatened to activate the JCPOA's 'snapback' mechanism, which would automatically reimpose such sanctions, if no deal is forged until August.[30] Militarily, strikes against Iranian nuclear and ballistic-missile sites could follow, by Israel and/or the US. In other words, time is running out for Tehran to forge a deal with Trump if it does not want to risk maximum economic and military pressure at the combined hands of the US, Israel, and Europe.

Even more crucially, such a scenario may only precipitate the spectre of another popular uprising against the regime – amid a long-term revolutionary process in Iran – triggered by an aggravated economic crisis bordering on chaos and collapse in particular and the aggravation of widespread public discontent in general.[31]

A foretaste of this can already be witnessed, as a nationwide strike by lorry drivers in protest over escalating economic pressures and government neglect has gripped the country, threatening Iran's supply chains.[32] Tellingly, the lorry-drivers' strike started on May 19 in Bandar Abbas, the major city near Rajaee Port, where on 26 April a huge explosion killed several drivers and left the injured frustrated over the lack of support from the authorities. Instead of helping, the authorities try to contain the strikes, mainly through suppression.[33]

In fact, the port explosion amounted to an economic show, occurring amidst the most severe economic crisis post-revolution Iran has faced. On the day of the third round of US–Iran talks, 10,000 containers detonated at Iran's 'golden gateway,' i.e. its most important international-trade hub – Rajaee Port near Bandar Abbas along the Persian Gulf and near the Strait of Hormuz. The incident had a chilling connection to regime interests and priorities. The containers contained chemicals imported from China earlier this year to be used for the production of solid-fuelled ballistic missiles. Such an import was deemed necessary by Iran's rulers, not least because Israel had destroyed missile-production facilities in its October 2024 attack against Iran.[34] In fact, according to Iran's Ports and Maritime Organization, the port handles 85–90% of the country's container trade and more than half of its total trade.[35] To downplay the true extent of the incident, some Iranian officials falsely claimed that merely 15% of the nation's container trade had gone through that port. In fact, the port explosion is not only an economic shock whose macro- and socio-economic ramifications will unfold in the near to medium term, but also raised crucial security-related questions: Why were the containers carrying military chemicals not declared as such, and are these security liabilities the norm at that port and potentially at others? Also, have the explosions been a result of foreign sabotage? These security dimensions also cast a shadow on potential post-deal investments in Iran, given the central role that Rajaee plays as an economic hub and major port of entry.

Now, amidst the ever-widening the truckers' strike, the Supreme National Security Council (SCSC) – an elite body tasked with regime security and enjoying overriding powers – for the second time after September 2024 intervened to block the implementation of December 2023 legislation tightening the hijab laws.[36] The timing suggests the regime's fear that its security forces may be overstretched if faced with both strikes and renewed upheaval akin to the 2022 'Woman, Life, Freedom' movement that had marked the erstwhile culmination of a revolutionary process that continues to rage underneath the surface.

Tehran's counterstrategy

Moreover, the Islamic Republic's concerns about the negotiations are also reflected in its will to control the domestic narrative surrounding the talks. As such, officials and state media insisted that Witkoff's premature departure during the fifth round in Rome was due to his alleged need to "catch a flight" – whereas Trump's Middle East Envoy is known to use his private jet for his government duties, translating into a relatively flexible flight schedule. This regime narrative demonstrated the fear and dangers associated with admitting the failure of that round. After all, the SNSC continues to impose a media ban on reporting about details of the talks with Washington, especially forbidding Iranian domestic media from referring to foreign-media coverage.

Therefore, crucially, Tehran will try to drag out diplomacy in a delicate balancing act to protect its red lines while avoiding the collapse of the talks. The underpinning hope is that the longer diplomacy lasts, the stronger the possibility that US demands soften.

Key in this regard is the attempt to offer tactical concessions of a cosmetic and temporary rather than substantive and permanent nature, potentially translating into a temporary deal. This could include a "zero enrichment" period as a confidence-building measure to avert the dismantling of its nuclear infrastructure. According to a report in *The Guardian* on 15 May, the Omani mediators proposed to Araghchi that Iran accept a three-year period of "zero enrichment," after which it would revert to the 2015 JCPOA's 3.67% level.[37] In these three years, Moscow would provide Iran with enriched uranium. More recently, according to a *Reuters* report on 28 May, Iranian official sources have suggested that

Tehran may halt uranium enrichment for one year, ship part of its highly enriched stock abroad or convert it into fuel plates for civilian nuclear purposes.[38] In return, Washington ought to release frozen Iranian funds and recognise Iran's right to refine uranium for civilian purposes. Such a political deal could lead to a broader nuclear accord, the sources suggested. Yet, prior to the next, sixth round of talks, even this one-year pause has been publicly rejected by Iran's Foreign Ministry.[39] In fact, these scenarios would depend upon Trump's flexibility and his ability to portray such a deal as a victory, despite likely opposition from elements within the US establishment and from Israel.

At the same time, Iran continues to issue counterthreats to ward off military and economic pressures by threatening Israel with a missile barrage that overwhelms its air defence and Europe with veiled threats in case of the activation of 'snapback'. Moreover, there are indications that Tehran may once again flaunt its 'negative power' in the Gulf – probably with the aim of pressuring Arab Gulf states to lobby Washington for a softer Iran stance. On 20 May, for instance, a Panama-flagged Emirati tanker in the Persian Gulf was 'hijacked' by a ship from the Iranian shadow fleet that is maintained by the IRGC.[40] In fact, following Trump's JCPOA withdrawal, Tehran had pursued a dual strategy whose replication today carries more risks than then: On the one hand, nuclear escalation (though today this could provoke strikes against its nuclear infrastructure) and on the other, targeting UAE and Saudi energy infrastructures with a series of sabotage operations and drone attacks. This culminated in September 2019 in a drone attack by the Houthis on the heart of Saudi oil production, which managed to halve it. This acute vulnerability of the Gulf states' economic models has ever since become a trauma, which paved the way for Abu Dhabi and Riyadh seeking rapprochement with Tehran over the past few years.

In addition, Tehran may hope that differences between Trump's and Netanyahu's preferences over Iran will reappear. In fact, before the recent overlapping of the US' and Israel's objectives in terms of "zero enrichment", there have been signs of a Trump–Netanyahu estrangement and even diversion over some Middle Eastern conflicts. For instance, Israel was caught off-guard by Trump's announcement about the start of Iran talks right during Netanyahu's visit to the Oval Office on 7 April or his ceasefire deal with the Houthis that did not stop their attacks on Israel. On Iran, it is not entirely clear whether Trump opposes Israeli military action against Iran in general or only temporarily as long as talks with Tehran last.[41]

At the same time, there have also been voices within the Iranian foreign-policy establishment, such as Mostafa Zahrani, the former head of the Institute for Political and International Studies (IPIS), the Iranian Foreign Ministry's think-tank, to take advantage of the inexperience of Witkoff to strike a "comprehensive" deal with Washington.[42] However, this is likely to mean one that one would address all issues (nuclear, missiles, and regional policies) in a temporary and cosmetic rather than fundamental and irreversible fashion – given the earlier-noted sources-of-power dimensions of those Iranian programmes and policies.

Last but not least, and in contrast to past instances of diplomacy between the West and Iran, it is not clear what the exact bargain this time will be: per JCPOA, this was nuclear de-escalation (a significant reduction of the nuclear programme while allowing Iran the right to enrich uranium at 3.67% on its own soil) in return for sanctions relief.[43] Today, the latter component may be replaced by pressure relief (both economic and military), while the US may allow Iran access to its frozen assets abroad, including $6 billion parked in Qatar.

Conclusion

In sum, the US–Iran talks carry tremendous stakes for all actors involved, whether present at the negotiation table or not – like Israel, Europe, the Arab Gulf states, and not least Iranian society, as it is held hostage to the regime's priority to ensure its survival by all means necessary. For the Islamic Republic – finding itself in a position of historic geopolitical and economic vulnerability – the negotiations involve gigantic risks, with major regime destabilisation a realistic scenario. The outcome, however, hinges largely on the Trump administration, given the formidable military and economic tools still at the United States' disposal – and the vagaries of a US President whose erratic decision-making injects significant uncertainty into a high-stakes process.

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